
Hiring the Director



One of the Board's most important responsibilities is hiring the director.

The needs of your library and your community will determine who will be the best person to fill the position. One Board may decide that imagination and energy are the most important characteristics the new director needs to have. Another Board might put more emphasis on administrative experience, while still others on education and library experience. Whatever combination of expertise and vision your Board determines is needed, the guiding directive should be that the Board is responsible for hiring the best candidate possible to direct the library.

Human Resources Standards and Services Bureau
<http://hr.mt.gov/hrservices/homehr.asp>

The process of hiring a new director begins long before recruitment advertisements are placed. Although only local trustees and officials can determine the type of person they want and need as director, Boards must organize their search and gather the needed information to conduct a legal and productive recruiting campaign.

Below are suggested guidelines to assist the Board in hiring the director.

1. Know the law

Before recruiting and hiring a director, the Board should learn about federal and state laws concerning equal opportunity, affirmative action and the issues of confidentiality, public information and documentation as they apply to the hiring process. The city or county human resources department can help the Board with this as well as with the hiring process as a whole.

The Board can also ask the city or county attorney to provide information about the legal aspects of hiring. Ask the attorney to give a short presentation to the Board, with time for questions. Understanding these issues is vital to conducting a legal recruitment and hiring.

2. Develop a recruitment timeline

The details of the schedule can be prepared by the search committee, once it is appointed, but the Board should determine the timeline for the hiring process. Realistically, the entire process will take from two to five months.

If the Board has plenty of advance notice (as in the case of a planned retirement, for instance), it is often possible to have a new director begin the day the previous director leaves. If the current director is leaving within a month of giving notice, the Board will need to appoint an acting director to serve while the recruitment process is under way. In this case, the Board needs to decide:

- Does it matter if the acting director will also likely be an applicant for the position?
- If the acting director is a current staff member, is he or she expected to handle the responsibilities of both positions?
- What is a fair salary for the acting director?
- How long do you anticipate the need for an acting director?

3. Develop a realistic budget

In developing a budget for the recruitment and hiring process, the Board needs to consider if and how much money is available to spend on:

- the acting director's salary
- advertisements (where and how often)
- out-of-town applicants' travel expenses for final interviews
- interviewing expenses, such as lunch with the Board
- long-distance telephone expenses for verifying applicant's employment history, level of education and references

4. Write a job description

Before recruitment begins, the Board needs to determine what exactly the director is to do and what qualifications are required. If the library has a job description for director on file, the Board should review this with the current director and update or revise it as necessary.

Librarianship is a technical, professional career. Even in the smallest library, the level of service, financial management, public relations activities and organization and selection of books and other materials all require some specialized knowledge and skill. Sometimes this expertise can be obtained through experience, but usually it is gained through formal education and training, leading to a master's degree in library and information science.

5. Determine salary range and benefits

Salary and benefits for the position of library director vary across Montana, depending on the resources of each community. The Board has the legal right

to set the director's salary and benefits. Considerations may include any or all of the following:

- Library budget
- Current director's salary and benefits
- Existing personnel policy and salary scales
- Policy and practices of the governing body (if applicable)
- Comparison of the salary structure of other local government employees with similar responsibilities and qualifications
- Negotiation, if necessary, with funding bodies to obtain the necessary funds to allow the library to pay an equitable salary for the level of expertise required

MCA 22-1-310
http://data.opi.mt.gov/bills/mca_toc/index.htm

6. Establish a search committee

A search committee allows the community to become involved in the selection process. The size of the committee depends on the community, but seven or eight members allows representation of various segments of the community that have an interest in the library. Possible members are:

- at least two trustees
- a library staff member if there are at least three employees other than the director
- a city council member or county commissioner, depending on the governing structure of the library
- the president of the Friends of the Library and/or a member of the library foundation board, should those organizations exist in your community
- a school board member or school administrator
- one or two members of the community at large, such as a parent of a preschool library user and a representative from the chamber of commerce

The goal is to have good community and political involvement in the hiring process. That said, the Board needs to give clear guidance to the committee when the members are appointed. The Board chairperson often serves as the chair of the search committee.

The role of the committee is to do the planning, recruiting and initial screening of applicants. The Board should decide before the committee is appointed how much involvement it wants the committee to have in selection of finalists. The committee could be asked to interview finalists and make recommendations to the Board for first, second and possibly third choices.

Once formed, the search committee's tasks are as follows:

◆ **Round out the job description and qualification requirements**

A good place for the committee to start is by listing characteristics. For example:

Personal qualities: What kind of person do we want?

- enthusiasm
- willingness to work hard
- cooperative attitude
- service attitude
- friendliness
- leadership skills

Administrative skills: What kind of experience as an administrator and what kind of management training do we want applicants to have?

- budget preparation and administration
- personnel and volunteer management
- good communicator, with public speaking abilities and good writing skills
- time management skills
- computer skills
- facility management

Professional competencies: What does the director need to be able to do?

- Explain and implement the philosophy of public library service, including the concepts associated with intellectual freedom, as expressed in the Freedom to Read statement and the Library Bill of Rights of the American Library Association.
- Understand and practice the principles of material selection and acquisition for library material in a variety of formats.
- Implement the cataloging and classification scheme used by the library (usually the Dewey Decimal Classification).
- Provide information service to the patrons of the library through an understanding of the reference interview process and the use of standard information or reference sources.
- Organize and conduct programs for adults, students and preschool children, as needed by the library.

◆ **Develop a detailed timeline**

Be realistic in preparing this timeline and then maintain the schedule if at all possible. If unforeseen delays do occur, the schedule should be revised and the public informed. Include in the timeline:

- Dates for recruitment advertising
- Date and time of application deadline
- Dates of application review period and recommendations made to the Board
- Approximate interview dates (at least “the week of....”)
- Target start date for new director
- Dates and times for search committee meetings (meetings should be scheduled well in advance so members can be available to accomplish the various tasks of the process)

◆ **Establish review criteria**

Establish the process and criteria by which the applications will be initially reviewed, based on the requirements determined in completing the job description. The Board can contact the city or county human resources department or attorney for assistance in developing review criteria. Some of the basic criteria used to screen applications might include:

- Submitted within the advertised deadline
- Inclusion of both resume and cover letter
- Completed application form (if form is necessary, be certain that it meets current legal requirements; for example, it cannot include questions about age, race, children, marital status, etc.)
- Basic educational requirements met and verified by the committee chair or a designated committee member
- Basic experience and reference requirements met and verified (This process is often conducted by calling each previous employer and reference, and asking specific, pre-determined questions. Replies should be noted on a form for each applicant.)

◆ **Establish ranking criteria**

Applicants meeting the basic review criteria will then be ranked by the committee, so the process and criteria for ranking must also be developed. At the very least, score sheets should be prepared for committee members to use to evaluate each applicant’s ability to meet the requirements in library and management ability, experience and knowledge.

◆ **Implement initial recruiting process**

After completing the previous steps, the search committee advertises the position, checks the basic qualifications and ranks the applicants according to the plan. It then meets and shares its rankings or scoring of the applicants, arriving at a consensus concerning its recommendations for finalists to be interviewed by the Board.

On occasion, the search committee might find that too few, or even no, applicants meet enough of the criteria for the committee to comfortably recommend finalists to the Board. If that is the case, the committee may want to recommend that the Board establish a new timeline and re-open the search with the same criteria and salary/benefits as before.

Or, perhaps the search committee might recommend that the Board review the job description and qualifications in light of the salary offered. The Board might need to take one of the following actions.

- Find a way to increase the salary and benefits to attract individuals qualified for the position.
- Reduce the qualifications to allow consideration of less-experienced or less-educated applicants. If the Board takes this course of action, it needs to rank—in order of importance—the skills, knowledge and qualifications it originally desired to avoid compromising in vital areas of need.
- Determine if it is possible to compromise on some of the qualifications if an applicant was willing to be hired as a trainee for a period of time, during which the individual would acquire specific skills or knowledge through formal classes, workshops or individual learning.

The Wrong Question

Due to federal law, certain questions cannot be asked of job candidates. Questions to avoid when interviewing candidates include:

- ✗ Age
- ✗ Date of birth
- ✗ Religion or church affiliation
- ✗ Father's surname or mother's maiden name
- ✗ Marital status
- ✗ What languages they speak (unless it is a job requirement)
- ✗ How many children they have, their children's ages and who will care for the children while applicant is working
- ✗ Financial information not related to compensation
- ✗ If they served in the military of any foreign country

◆ **Notify candidates and set up interviews**

After the search committee gives its recommendations for finalists to the Board, it then notifies the candidates and schedules interviews. The committee will also structure the interview process. It should always include:

- structured questions prepared ahead of time and asked of all candidates, to ensure they are all treated consistently
- standard evaluation sheet and scoring scheme
- adequate time for discussion, as the interview is a mutual evaluation process
- brief tour of the library

In addition, the search committee might arrange for some or all of the following activities to be part of the interview.

- Assessment exercises (use the library collection)
- Interview with the search committee (with a report and recommendations to be made by the committee to the Board)
- A social event such as a reception with local officials or simply lunch or dinner with the Board
- Tour of the community

7. Conduct the interviews

Once the search committee schedules and structures the interviews with the finalists, the Board conducts them.

As a trustee, you need to be knowledgeable about what you can and cannot ask during an employment interview. Your questions must be related to the job description and how the applicant will perform the job. For example, you may ask why the applicant left former places of employment and what kind of references the applicant would receive from former employers. You can also ask if there are hours or days that the applicant would be unavailable to work. But you cannot ask questions such as the applicant's age (see "The Wrong Question," on facing page).

Given the legal regulations affecting employment interviews, it is important that trustees follow the prepared questions when interviewing director finalists. Trustees are encouraged to consult with the city or county attorney or human resources department for additional interview guidelines.

8. Select the new director

The Board selects the new director through discussion and by ranking the candidates based on the predetermined selection criteria. In addition to reaching a consensus on their first choice, trustees should also determine their second and third choices at this point, in case the selected candidate turns down the Board's offer or the Board and candidate cannot reach an agreement about the terms of employment.

This phase of the hiring process includes the following steps.

- Make a verbal offer to the selected candidate, including salary, benefits, anticipated starting date and length of the probationary period, if any, followed by a verification of the offer in writing. If the candidate accepts the offer, ask for a written confirmation of acceptance and the specific terms.
- If the first candidate declines the offer, offer the position to the second candidate or consider options such as re-opening the position or reviewing the salary and qualification requirements.
- After receiving written confirmation of acceptance from the candidate, write all other candidates to thank them and inform them of your decision.
- Officially thank the search committee and all those involved in the hiring process.
- Take care of practical arrangements, such as providing assistance with the new director's relocation to your community, if applicable.
- Welcome the new director and introduce the individual to staff, local government officials and others in the community.

9. Notify the public

Before the new director begins work, the Board should send news releases to the local media and other appropriate organizations. The State Library should also be contacted.

10. Monitor the probationary period

A probationary period of six months to a year is common practice for new directors. The Board should informally evaluate the director's performance midway during this period, and then do a formal evaluation at the end of the probationary period to determine whether to retain or dismiss the director. Future evaluations should be done on an annual basis (see Chapter 10, Evaluating the Director).

Montana Library Certification Program

The Montana State Library Commission requires that library directors of libraries serving populations greater than 25,000 people have a graduate degree in library or information science. For communities with service area populations less than 25,000, library directors without a master's of library science degree must have professional certification as defined by the Montana Library Certification Program. To learn more about the program, or to receive a copy of the *Montana Library Certification Program Manual*, contact the State Library. The publication is also available on the State Library's web site.

Montana Certification Program Manual
<http://msl.mt.gov/slr/Certification/certman.pdf>

Local Boards may require certification of other staff as well. Trustees are also encouraged to participate in the program as continuing education is essential for ongoing development and enhancement of library services.

The goals of the Montana Library Certification Program are to:

- ◆ Improve library services throughout the state.
- ◆ Assist public library directors in meeting the library certification standard adopted by the State Library Commission.
- ◆ Encourage library directors, staff and trustees to acquire and improve their skills through basic and continuing education.
- ◆ Recognize those who continue to update their skills and knowledge to provide better library services.
- ◆ Improve the public image of librarians and libraries.
- ◆ Provide guidelines for Boards to use to select and retain personnel.

When a new director is hired, he or she should enroll in the Montana Library Certification Program. This requires the completion of an enrollment application and an enrollment fee. The library director will have three years to complete the required hours of continuing education credits.

Certification needs to be renewed periodically.

Working with the Director

How the Board interacts with the library director can have as much impact on library services as anything else the Board does. The two must work together closely, but they have very distinct areas of responsibility. Building a relationship of mutual respect and clear communication will ensure that both the Board and the director can do their jobs well.

The first thing to realize in working with the library director is that the director reports to the Board as a whole not to individual trustees. Therefore, a trustee cannot give orders or suggestions to the director unless the action is approved by the entire Board.

While the library director reports to the Board, the Board does not supervise the director's day-to-day activities. The Board's role is to define the director's duties in a written job description and perhaps prepare an annual work plan based on the library's long-term plan (see Chapter 15-2, Planning for the Future). It is then up to the library director to determine how she or he will perform those duties.

That said, the Board still needs to be aware of what the library director does as part of the Board's accountability to taxpayers. The Board should conduct an annual evaluation of the director's performance (see Chapter 10, Evaluating the Director, for detailed information) but the Board needs to have additional processes for staying current on the director's activities. For example, the Board can ask for a monthly report from the director.

By asking questions and showing an interest in what is happening at the library, the Board shows that it cares about the library and the director. As in any work situation, expressing interest and respect increases morale and productivity.

Motivation

A good employer knows how to motivate valuable employees. Although the Board and library director do not have a typical employer/employee relationship, the Board still has a role to play in keeping the director motivated to do his or her best job possible.

Different people are motivated by different things. The Board will have to learn what the director values and desires. For instance, does he or she value a challenging position above all else? Is recognition important? What about child care, additional staff members or increases in pay? After asking the library director what is important to him or her, and why, the Board can try to find a way to make it happen.

One simple thing that helps keep people motivated is acknowledging their accomplishments. Be specific. Rather than saying, “Good job,” for example, say, “I like how you handled that angry customer. Your patience, willingness to listen and determination to solve the problem kept the situation from escalating.” By being specific, you show respect and caring.

Salary and Benefits

Compensation is often the hardest issue to deal with as a Board trustee. Although wages are a basic element in job satisfaction, low pay is a problem in the library field as a whole and particularly in rural areas where city and county budgets are tight. Nonetheless, it is up to the Board to try and ensure that the director receives a competitive salary and benefits. The director is a key factor in the quality of services a library can provide its community, and a director who is well satisfied with the position is likely to do a much better job of serving the community than one who is unhappy.

To determine if your director’s salary should be increased, compare it to that provided by other libraries of the same size as well as to the compensation paid to department heads in other public and private organizations. If the salary is too low, talk to the appropriate government officials about increasing it. Perhaps more of the budget can be allocated to the director’s salary, or the budget can be increased. It may take several attempts for your efforts to bear fruit.

Once the base salary of the director is improved, the Board should address raises and benefits. Cost of living raises are standard elements of a fair compensation plan. If the library is not part of a government compensation system, health insurance is another benefit to consider.

If the library simply cannot afford to offer standard raises and benefits, the Board can compensate the library director in nonmonetary ways. Consider giving the director some time off with pay, for instance. Trustees can also always publicly acknowledge the director's hard work, as well as volunteer for projects that lighten the director's responsibilities.

The Board's efforts can make a big difference in the library director's working conditions. Remember: being an advocate for the library also means being an advocate for the director.

Continuing Education

Because librarianship is always changing, it is important that the library director stay informed about innovations and advancements in the profession. Continuing education is the best way to do this. In fact, the director is required to participate in continuing education under the Public Library Standards, which the library must meet to be eligible for state aid. The standards state that directors must be certified through the Montana Library Certification Program. Certification and renewal of certification both specify the number of continuing education credits required and the time allowed for earning the credits. (See Appendix B, The Public Library Standards, and Chapter 7-9, Hiring the Director, for more on the Montana Library Certification Program.)

Because the continued education of the director is so important, the Board is strongly encouraged to support the director's efforts to attend training. This includes both approval of time off with pay to travel to workshops and conferences, and financial assistance for registration fees and other expenses. A director should not be asked to attend continuing education opportunities on personal time or at personal expense. A director who is well trained and who continues to learn about the library profession is an asset to the library and the library's patrons.

Common Missteps

There are legal limits to what the Board can ask of its library director. One of the most common mistakes made by Boards is asking the library director to work more hours than she or he is paid for. Many library directors go above and beyond what is required and give extensively of their personal time to the library without being asked to do so. As a Board member, not only should you not ask them to volunteer their time, you should make it a goal to see that they are paid for actual hours worked.

Some trustees will ask the library director to work holidays reasoning that the director is being paid for the day and so should work it. In some cases, this is illegal. It can also be demoralizing, especially if the director already receives few benefits as is the case in many libraries in Montana.

Finally, don't micromanage. After the Board and the library director have agreed on the director's job responsibilities, the Board must let the director take the lead. Problems need to be addressed, but even in these cases, the situation needs to be handled with respect. Step back and ask yourself if there really is a problem or if the situation is just a difference of opinion or style. There are different ways to reach the same goal of providing the community with excellent library services.

Working with the Library Staff

Although decisions by the Board affect working conditions, salaries and other aspects of typical employer/employee relationships, you as a trustee need to understand and respect the chain of command in which the director reports to the Board and the staff reports to the director.

Under this structure, the Board:

- ✓ has no direct responsibility for day-to-day supervision of staff other than overseeing the director. Board members have no authority to issue orders to staff or make demands of them except through the director.
- ✓ has no direct responsibility for assessing staff performance other than that of the director. The director is expected to give the Board regular reports about staff performance.
- ✓ does not usually act on complaints from the staff. Should a staff member ignore the command structure and take concerns and complaints to a trustee, or the entire Board, it is the trustee(s)' responsibility to remind the individual about the proper procedure.

This command structure is designed to make things work, not to hinder communication. Failure by any trustee to adhere to this structure can result in organizational problems. Not only is the director's authority compromised, so too is the director's job performance. The Board will not be able to hold the director accountable for staff performance if trustees get involved in staff management.

In addition, staff morale will be damaged. Staff will not have a clear understanding of who is in charge and to whom they will be accountable. And once the precedent is set, staff will believe they can go to the Board with every issue, resulting in the director becoming an ineffective figurehead without real authority.

A Team Effort

Acceptance of the command structure does not mean that a wall is placed between the Board and the library staff. The Board, director and staff need to view themselves as part of the same team, with the same mission - service.

Board members may often work with the library director and staff members on committee work. All are involved in long-range planning and building community awareness and support.

As a trustee, you should show concern for the well-being of the staff. The Board should be concerned about retention of good staff, especially as it relates to budgeting pay and benefits. In addition, the Board should work with the director to recognize and acknowledge good performance and say thanks to staff through specific Board action.

Adapted from The Board Team Handbook: A Complete Guide to Boardsmanship Basics for the Board Team of the 90's, published by the Cain Consulting Group, 1992.

Evaluating the Director

Trustees evaluate the director all of the time—by what they see in the library, what they hear from the public and what they perceive as the library’s reputation in the community. But that informal consideration does not take the place of a formal review of the director’s performance.

There are several good reasons for an annual evaluation. It:

- Provides the director with a clear understanding of the Board’s expectations and its perceptions of how those expectations are being met.
- Identifies the Board’s concerns and initiates a procedure for actions to be taken.
- Creates an opportunity to review and acknowledge the director’s accomplishments as well as to establish a record of unsatisfactory performance if there is ever cause to terminate employment.
- Demonstrates sound management and accountability to community officials and the public.

Boards often delegate the task of developing a preliminary evaluation of the director to the personnel committee or a specially appointed committee, especially if particular trustees have experience in human resource management. The key is to be consistent and decide ahead of time who will take part. Although a special committee can do the preliminary evaluation process, the entire Board should review, discuss and approve the final written evaluation.

To be effective, the evaluation process needs to match the specific local situation. The current trend in employee evaluations is toward clearly stated performance goals and measured outcomes. The clearer the expectations, the easier the process will be. In fact, the evaluation process is difficult only when the Board is unsure of what process to follow or what criteria to use.

The Basis for the Review

Although your specific library situation will determine what you will consider when evaluating the director's performance, the starting point should always be the director's written job description. This document must be kept up to date so that it is a realistic statement of the work that the Board expects the director to do. A director should never be faulted for failing to do something that was not agreed upon at the time of hire or at a later Board meeting.

During the evaluation, the director and Board can agree on a list of objectives that can be used as a basis for evaluation the following year. The list should be closely related to the library's long-range plan (see Chapter 15-2, Planning for the Future). It is important to remember that it might not be possible for the director to meet all of the objectives and that failing to do so does not necessarily indicate poor job performance. More important to consider when evaluating objectives are the progress, initiative and willingness of the director to expand the limits of his or her work and understanding.

Other important parts of the review are the success of the library in carrying out service programs and resource management. Monthly financial statements, statistical reports and other management documents offer a more reliable assessment of the library director's performance than do subjective comments from individuals.

As part of the performance evaluation, it can be helpful to have the library director fill out a copy of the evaluation form as a self-assessment. Comparison of the director's form and the committee or Board's completed form will establish areas of agreement and indicate work to be done in resolving differences. The Board can decide if the director's self-assessment is to be considered part of the permanent record. Either way, the director should have the opportunity to respond in writing to reviews if she or he chooses to do so. No performance review should ever be placed in a personnel file without the knowledge of the director.

All discussions of the director's job performance should be carried out in legally posted and conducted meetings. (See Chapter 4-4, Complying with the Law, for more information about the Open Meeting Law.)

Prevent Surprises During the Annual Performance Evaluation

- ✓ Work with the director to resolve performance problems when they occur.
- ✓ Be willing to discuss the issue and offer solutions.
- ✓ Acknowledge good work and accomplishments.

Review Criteria

Sample of evaluation forms are included at the end of this chapter (beginning on page 10-7). These can be adapted to your library situation and your director's written job description. The following list gives you some points to consider in finalizing the evaluation process and considering a list of objectives for the coming year.

Preparing and managing the budget

- Is all the necessary staff work completed in a timely manner prior to presentation to the Board?
- Does the budget cover all necessary expenses?
- Are funds allocated or reserved for unanticipated contingencies?
- Are the funds effectively allocated?
- Are midcourse corrections minimized?

Managing the staff

- Are positive management/staff relations maintained?
- Are fair and equitable policies proposed for Board adoption and then fairly administered?
- Have grievances been filed? If so, what is their nature?

Professional state-of-the-art awareness

- Are innovative methods of service delivery, technical processes, etc., studied thoroughly; implemented only after they fit the needs of the institution and are proven to be cost effective?
- Does the director maintain an adequate knowledge of the current state-of-the-art?
- Is the staff encouraged and assisted in maintaining an awareness of technological advances in the profession?
- Conversely, how prone is the director to adopting change for change's sake?

Collection management

- How adequate is the library's program of determining user needs/wants and translating these into acquisitions and services?
- Have adequate criteria been established to enable the library to react systematically to materials budget cuts?

Implementation of Board decisions

- Are Board decisions implemented on a timely basis?
- Once a decision has been made, does the director fully and enthusiastically back Board decisions or are they sometimes presented to staff in an apologetic or deprecatory manner?

Use of the library

- How effectively are library services communicated to the public?
- Is a realistic balance established between promotion of services and budget constraints?
- Are circulation trends and in-house use adequately analyzed and are there appropriate reactions to the results of such analyses?
- How well is information on new services communicated to the public?

Development of staff

- Are potential managers encouraged to develop career goals?
- Are internal candidates for promotion competitive with outside candidates for management positions?
- Does the director adequately justify the need for, actively campaign and adequately account for staff development funds?
- Is cross-training leveraged to provide service to the public?

Utilization of staff

- Is there a clear separation of professional and clerical tasks for staff guidance?
- Have peak service hours been identified and staff deployed accordingly?
- Are functions analyzed periodically with the objective of combining, eliminating and/or creating new positions?

Community development

- How active is the director in the community?
- Is the director “visible” to large segments of the population?
- Is the director available for speaking engagements in the community?

Activity in professional organizations

- Does the director actively participate in MLA, ALA, PNLA, etc.?
- Does the director hold office in professional organizations?

- Has the director published articles in professional journals?

Policy recommendations to Board

- Is adequate staff work completed prior to presentation to the Board?
- Are reasonable alternatives recommended?
- Are policy recommendations generally proactive rather than reactive?
- Are policy recommendations usually necessary and appropriate to the efficient operation of the library?

Friends of the Library

- Has the director actively promoted the formation and/or maintenance of a Friends group?
- Does the director provide adequate support to the organization?
- Has the director helped define the role of the Friends group?

Maintenance and construction of physical plants

- Within the imposed budgetary constraints are the buildings and grounds adequately maintained?
- Does the director have an outgoing program that provides adequate information on the need for new and/or remodeled facilities?

Establishing priorities

- Are the director's recommended priorities in concert with the library's mission as defined by the Board?
- Do these priorities appropriately reflect community needs?
- Are priorities established proactively or reactively?

Staff selection

- Is staff selection accomplished at appropriate supervisory levels and with adequate use of staff resources?
- Is adequate emphasis placed on equal opportunity employer/affirmative action and is the director's commitment to these principles communicated to the staff?
- Is the selection process designed to ensure the selection of the best person for the job?

Short- and long-range planning

- Do the director's short- and long-range plans reflect Board priorities?
- Are the short- and long-range plans updated on a continuous basis to reflect changing circumstances?
- Are the director's accomplishments in sync with the short- and long-range plans?
- Are the short- and long-range plans flexible enough to allow for changing circumstances?
- Does the director provide adequate information to the Board on the implementation, revision, etc., of short- and long-range planning?

Miscellaneous rating factors

- Are "hard decisions" made and implemented or are they deferred or ignored?
- Does the director display adequate initiative or rather merely react to necessities?
- Is the director objective in making the necessary decision or do personal prejudices intrude too often?
- Is the director consistent in decisions that affect the staff and/or public?
- Is the director open with the Board or does a "hidden" agenda intrude too often in the relationship?
- Does the director set an example for the staff through professional conduct, high principles, business-like approach, good work habits, etc.?

Evaluation Form – Sample 1

Name:

Evaluation Period:

Responsibilities

Expectations and Goals

Comments

Overall Performance

Comments:

Performance Rating:

___Above satisfactory ___Satisfactory

___Below satisfactory

Employee: ___ Agree ___Disagree

Signature _____

Date _____

Evaluation Form – Sample 2

CRITERIA FOR DIRECTOR’S EVALUATION

Budgeting and Financial Management:

- Manages the library’s resources appropriately
- Involves Board members appropriately in managing library resources
- Prepares budgets and oversees preparation of financial statements so Board members can understand them

Communications

- Attends all Board meetings and participates appropriately
- Writes well-written reports and proposals, containing enough information to help Board members make informed decisions without being wordy or lacking in essential details
- Represents the library at important state, regional and national meetings and reports on significant happenings
- Communicates appropriately with elected officials, Friends of the Library, patrons and others
- Is responsible for public relations, effectively communicating library services to the public

Physical Plant:

- Supervises the general maintenance of buildings and grounds
- Informs Board of the status of building and grounds

Policies and Guidelines:

- Recommends policy changes as needed, with suggested wording
- Implements Board policy and guidelines appropriately

Staff Recruiting and Supervision:

- Keeps the Board informed about staff changes
- Administers salaries, involving the Board appropriately
- Delegates responsibility and authority to staff members in a way that empowers them to do their jobs well and accomplish the mission of the library

Staff Training:

- Prepares and presents training opportunities for staff members and trustees
- Attends appropriate continuing education opportunities

LIBRARY DIRECTOR PERFORMANCE APPRAISAL

Goal Setting:

The following are goals agreed upon by the director and the trustees for the director to accomplish during the next twelve months:

Comments:

1. Noteworthy accomplishments of the director during the past year have been:

2. Situations that might have been handled differently were:

3. Additional comments:

From Richards Free Library, Newport Regional Library, Newport, New Hampshire, 2005

Evaluation Form – Sample 3

Job Title: Library Director

Name: _____ Date: _____

Reason for Evaluation: End of probation ____ Annual ____ Final ____ Other _____

Administrative Services Duties:

1. Act as the Board's executive officer.
2. Serve as the technical adviser to the Board.
3. Implement the policies of the library as established by the Board.
4. Prepare the draft of the annual library budget for Board discussion and approval.
5. Participate in the presentation of the adopted budget to local officials.
6. Receive and expend library funds according to established guidelines and maintain accurate and up-to-date records showing the status of library finances.
7. Recruit, select, hire, supervise, evaluate and terminate if necessary library staff in conformity with library policy and state and federal law (and any applicable local civil service regulations and/or union contracts).
8. Prepare Board meeting agendas and necessary reports in cooperation with the Board president, and notify Board members of scheduled meetings.
9. Prepare state annual report for review and approval by the Board.
10. Inform and advise the Board as to local, regional, state and national developments in the library field and work to maintain communication with other area libraries and the library system.

Rating: Excellent < 6 5 4 3 2 1 > Poor

Narrative evaluation and assessment of effort in achievement of annual objectives:

Collection Management Duties:

1. Select or direct the selection of materials for all media and all age groups, based on the library's approved collection development policy.
2. Catalog and classify library materials according to accepted standards and maintain the public catalog.
3. Process materials to provide appeal, protection and control.
4. Develop and maintain a regular weeding schedule.
5. Periodically review the collection development policy and make recommendations to the Board for revisions.
6. Oversee the shelving and organization of materials.
7. Prepare and distribute overdue notices to users with overdue or lost materials.
8. Maintain an accurate and up-to-date database of user registrations and activities, including information adequate to support reimbursement requests for nonresident borrowing.

Rating: Excellent < 6 5 4 3 2 1 > Poor

Narrative evaluation and assessment of effort in achievement of annual objectives.

Service and Service Promotion Duties:

1. Develop and execute an array of service programs to address the various needs of users and to make the library more accessible to all. These might include: preparation and dissemination of bibliographies of popular topics and genre collections; tours of the library for school, daycare and home-school groups; inclusion of interesting displays of an educational or cultural nature; presentations to local organizations or groups on the benefits offered by the library; provision of storytime sessions for small children, and teen and adult book discussion sessions; support of a summer reading program; acquisition of special materials and provision of accommodations to encourage use of the library by individuals with special needs; development of a home-bound service for residents unable to visit the library.

2. Provide friendly and efficient direct assistance to users checking out materials, requesting directional or community information or seeking materials or information on specific topics.
3. Prepare news releases and submissions to the media to announce new or special services and events that spotlight the library.
4. Assist and guide local volunteer groups (e.g., Friends of the Library) who wish to help with library promotion, fundraising and enhancement of services.
5. Prepare grant applications, when grant opportunities are offered, to supplement local funding of library operations and development.
6. Maintain records showing all programs offered and number of attendees at each.
7. Continually investigate the value, costs and logistics of adding library services, new media and new technologies to keep the library current and proactive in its service provision to the public.
8. Conduct on-going evaluations of existing library programs, services, policies and procedures, and submit recommendations for improvements to the Board.

Rating: Excellent < 6 5 4 3 2 1 > Poor

Narrative evaluation and assessment of effort in achievement of annual objectives.

Facilities Management Duties:

1. Oversee care and maintenance of the library building and grounds.
2. Oversee the work of custodial staff.
3. Regularly review building needs and advise the Board in its planning for future expansion or development.
4. Assess the adequacy of existing facilities in regard to the provision of automated services.

Rating: Excellent < 6 5 4 3 2 1 > Poor

Narrative evaluation and assessment of effort in achievement of annual objectives:

Director's objectives for the coming year (agreed to by Board and director):

Certification:

Board President's Signature _____ Date: _____

Library Director's Signature _____ Date: _____

*From Trustee Essentials: A Handbook for Wisconsin Public Library Trustees prepared by the
DLTCL with the assistance of the Trustee Handbook Revision Task Force. Copyright 2002
Wisconsin Department of Public Instruction. This publication is also available at <http://dpi.wi.gov/pld/handbook.html>*

Evaluation Form – Sample 4

Form Instructions:

1. Each Board member should individually respond to this form.
2. To help in completing the form, Board members can refer to past Board minutes, usage statistics, program results and other information sources from the year.
3. Return the completed form to the Board President for inclusion in the Summation Form that will be used during the face-to-face meeting with the director.

Scale: E = excellent S = satisfactory N = needs improvement U = unknown

| Area of Organizational Health | Rating | | | |
|--|--------|---|---|---|
| Customer Service & Community Relations | | | | |
| • Level of patron satisfaction | E | S | N | U |
| • Customer service received by patrons | E | S | N | U |
| • Consistent application of policies that affect the public | E | S | N | U |
| • Services are communicated to the public effectively | E | S | N | U |
| • Working relationships and cooperative arrangements with government officials, community groups and organizations | E | S | N | U |
| • Awareness of community needs | E | S | N | U |
| • Mechanisms are in place to hear from patrons and the community at large | E | S | N | U |
| • Library is being marketed to the community | E | S | N | U |

Comments

CS&CR TOTALS: E___ S___ N___ U___

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Organizational Growth:

| | | | | |
|---|---|---|---|---|
| • The library is making progress on its long-range plan (LRP) | E | S | N | U |
| • Services to meet the goals and objectives of the LRP are carried out with staff and trustee involvement | E | S | N | U |
| • Goals and objectives are evaluated regularly | E | S | N | U |
| • Creativity and initiative are demonstrated in creating new services and programs | E | S | N | U |
| • Collection is responsive to changes in the community | E | S | N | U |
| • The library is responsive to changes in the community | E | S | N | U |
| • Staff are aware of library's long-range plan, policies and activities | E | S | N | U |

-
- There is a working knowledge of significant developments and trends in the field. E S N U
 - Building and grounds are kept up and needed repairs and maintenance are done on a timely basis E S N U

Comments:

OG TOTALS: E___ S___ N___ U___

Administration and Human Resource Management:

- Work is effectively assigned, appropriate levels of freedom and authority are delegated. E S N U
- * Job descriptions are developed; regular performance evaluations are held and documented. E S N U
- Personnel policies and state and federal regulations on workplaces and employment are effectively implemented. E S N U
- Policies and procedures are in place to maximize volunteer efforts. E S N U
- Staff development and education are encouraged. E S N U
- Staff understand how their role at the library relates to the mission. E S N U
- Library climate attracts, keeps and motivates a diverse staff of top-quality people. E S N U

Comments:

A&HRM TOTALS: E___ S___ N___ U___

Financial Management/Legal Compliance/Fund-raising:

- Adequate control and accounting of all funds takes place; library uses sound financial practices. E S N U
- Budget is prepared with input from staff and trustees; the library operates within budget guidelines E S N U
- Official records and documents are maintained; library is in compliance with federal, state and local regulations and reporting requirements (such as annual report, payroll withholding and reporting, etc.) E S N U
- Positive relationships with government, foundation and corporate funders are in place E S N U
- Funds are disbursed in accordance with budget, contract/grant requirements and donar designations E S N U

Comments:

FM/LC/F TOTALS: E___ S___ N___ U___

Board of Trustee Relationship:

- | | | | | |
|--|---|---|---|---|
| • Appropriate, adequate and timely information is provided to the Board. | E | S | N | U |
| • Support is provided to the Board. | E | S | N | U |
| • The Board is informed on the condition of the organization and all important factors influencing it. | | | | |
| • The Board works effectively. | E | S | N | U |

Comments:

BTR TOTALS: E___ S___ N___ U___

Additional comments:

Mid-Hudson Library System, Poughkeepsie, New York, 2006. For more trustee resources, see <http://midhudson.org/trustee/main.htm>